
Supplier User Guide for Flintshire County Council Procurement Portal

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1 Introduction

This User Guide has been compiled to assist Suppliers using the Flintshire County Council Procurement Portal.

The Flintshire County Council Procurement Portal, which will be referred to as the “Portal” or “Supplier Portal” in this guide, is being utilised by the Council as its’ e-Sourcing solution for quotation and tendering purposes. You will also find that other local authorities and private companies use the website and as such you may register with multiple buying organisations (or potential customers) as required.

The Supplier Portal is web-based and can be accessed anywhere with an internet connection. It is best to use, as much as possible, the latest version of Internet Explorer to gain full advantage of the system.

This User Guide will explain the process of self-registering your organisation on the Supplier Portal, maintaining users and addresses, the classifications of your business, and how to register interest in new business opportunities and respond to request for quotations and Invitations to Tender.

2 Accessing the Supplier Portal

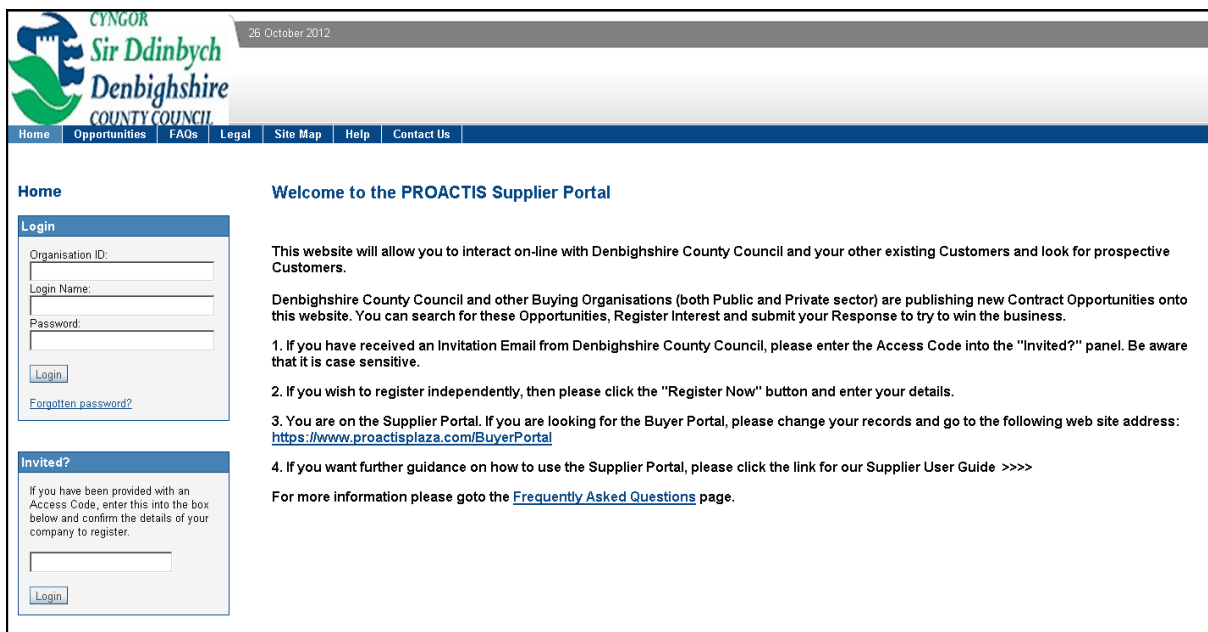
2.1 The Web-Site Address

To access the Supplier Portal, go to the following website address

<https://www.proactisplaza.com/?cid=DCC>

This address is the specific address for the Flintshire County Council Procurement Portal home page for suppliers

The page accessed will look like the screen shot below...



The screenshot shows the PROACTIS Supplier Portal Home Page for Denbighshire County Council. The page has a header with the council's logo and name, and a navigation menu with links to Home, Opportunities, FAQs, Legal, Site Map, Help, and Contact Us. The main content area is titled "Welcome to the PROACTIS Supplier Portal" and contains a "Login" section with fields for Organisation ID, Login Name, and Password, and a "Forgot password?" link. There is also an "Invited?" section with a field for an Access Code and a "Login" button. The page includes several numbered instructions for users, such as "1. If you have received an Invitation Email from Denbighshire County Council, please enter the Access Code into the 'Invited?' panel. Be aware that it is case sensitive." and "2. If you wish to register independently, then please click the 'Register Now' button and enter your details."

The Home Page has several areas/options available

2.2.1 Home Link

This is situated in the top left of the page. Clicking on this option will take you to the home page for the Portal if you have navigated elsewhere

2.2.2 Opportunities Link

This is situated in the top left of the page alongside the Home Link and will open a page that will allow public opportunities that have been published to the Opportunities Board by potential customers to be viewed.

Find Opportunities to Improve Your Business

From here you can search for and review the Opportunities on the Supplier Portal.

View:

Opportunities:

No records found

The “View” option has a drop-down list to either “All Open Opportunities” or “Recent Opportunities”. Click “GO” to run the search.

The “Advanced Search” button can also be used. This will open the following pop-up window to build a more advanced search to find specific opportunities...

Advanced Search Criteria

Enter your Search Criteria

Name	Operator	Value
Buyer	Contains	
Description	Contains	
Classification	In	
Closing Date	=	dd/mm/yyyy
Contract Start Date	=	dd/mm/yyyy
Contract End Date	=	dd/mm/yyyy

NOTE: this area is read-only and as such suppliers cannot register interest in opportunities only view them. Suppliers must be registered on the Supplier Portal and be logged into their account to be able to participate in any quotation or tender.

3 Logging into the Supplier Portal

From the Home Page noted in the previous section there are several ways to login to the Supplier Portal. These options are displayed in the left hand pane of the home page.

Login

Organisation ID:

Login Name:

Password:

[Forgotten password?](#)

The “Login” Section is for Suppliers who have registered and have login details. NOTE: the Forgotten Password link (see later for more information)

Type in the Organisation ID / Login Name / Password and click on the “Login” button

Invited?

If you have been invited to join the portal and given an Access Code, enter this into the box below and confirm the details of your company.

The “Invited?” Section is for Suppliers who have been sent an email by a Portal Customer asking them to register. In this case the email will include an Access Code to login with that acts as a temporary login.

Type in the Access Code and click on “Login” or use the link from the email received

Register

To register click the button below and give details about what you sell or want to buy

[Not received email?](#)

The “Register” Section is for Suppliers who have been asked to self-register by a Customer or for suppliers who have come across the website from a Google Search etc.

4 Self-Registering on the Supplier Portal

From the previous sections it has been described how to navigate to the relevant home page and use the appropriate option to follow this process. As a reminder, access the Supplier Portal Home Page, and click on the “Register Now” button in the bottom left corner of the page.

A Registration Wizard will then take you through the registration process. This should just take a few minutes to complete fully.

The Self-Registration process has 3 elements or steps...

- Basic contact information needs to be provided about your company
- An email is then set to the email address defined for your organisation. The email will provide authentication which allows the 3rd stage to be completed
- Finally the Organisation can be defined with multiple users/addresses/classifications and the process is then complete

4.1 Step 1 – Basic Details

Click on the “Register Now” button. The following page will be displayed...

Register for the PROACTIS Supplier Portal

Please follow these simple steps to register

- 1 Enter the following information and click the Register button to start the process
- 2 An activation email will be sent to the email address of your Primary Contact
- 3 Click on the link contained within the email to activate your account

Organisation Code

Enter a Code and Name to be used for your Organisation

Organisation Name:

Organisation ID:

Organisation Details

Enter the details for your Organisation

Address 1:

Address 2:

Town:

County:

Postcode:

Country:

Primary Contact Details

Enter the details for your Primary Contact

Login Name:

First Name:

Surname:

Email Address:

Repeat Email Address:

Memorable Questions

Please enter the answers to the following questions:

What is your Mother's maiden name?

What is the name of the town where you were born?

What is the name of your first school?

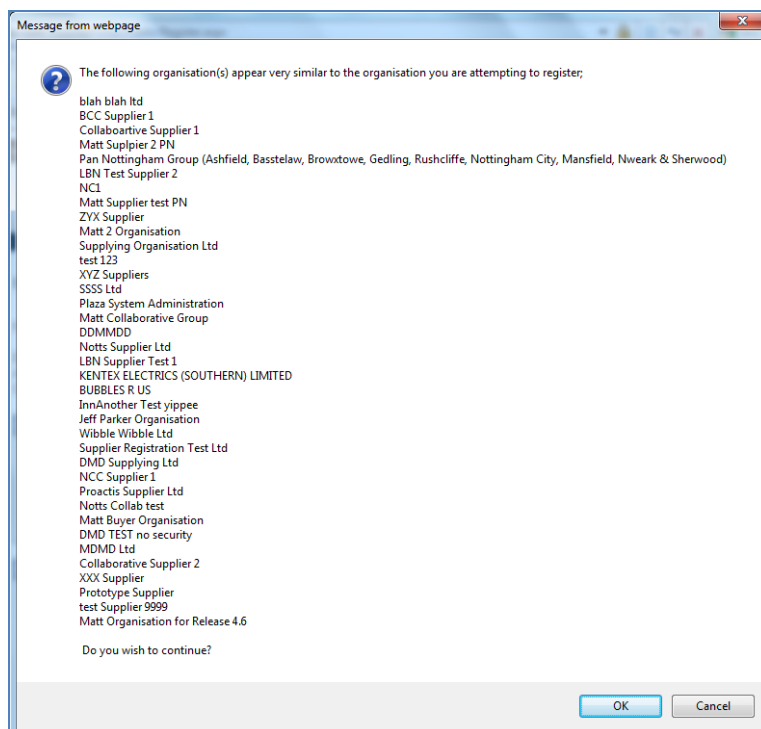
Insert the Name of your Organisation first and press the TAB button on your keyboard. An “Organisation ID” will be created for you. At this point you can change this to something more meaningful, if required. If not make a note of your Organisation ID for future reference.

For example, if your Organisation ID has been set to P4571798 you can change this to CONSTRUCTUS123, where the name of the organisation is ConstructUS. It is advisable to add a number at the end as the Organisation ID **MUST** be unique in the system so if other like-named organisations are registered already there could be an error in the registration process. Note also that there should be NO spaces or symbols – it must contain only letters and numbers.

Complete the rest of the details required e.g. address and Admin User login details. **NOTE:** the Login Name can be changed from ADMIN, if required. Please note this initial user being created as part of this process will be the one and only administrator for your organisation and will be the only user that can add/change/delete users/addresses/classifications etc. – All users will be able to login and register interest and respond to opportunities.

IMPORTANT: the “ADMIN” user needs to be used carefully. If the ADMIN user is leaving your organisation please ensure that their login details are passed onto someone taking over the responsibility. Otherwise there will be a problem administering your own organisation! This includes the Login Name and Password and their memorable answers to the security questions – these are required for the Forgotten Password functionality in the system. To overcome this if your organisation has or is able to set up a Generic email address e.g. **tenders@supplier123**, for the ADMIN user then this problem will be alleviated

Once all information has been completed click on the “Register” button. A pop-up window may appear that lists other suppliers that have registered that match the details provided thus far. This may be because the name is similar, the post code, email address is similar.



Click on OK if the Organisations are NOT yours. This will continue the registration process. Click Cancel if you do find a matched organisation in the list. You will need to find out who has registered internally within your organisation and you can ask the person to add you as a user for your organisation and as such you do not need to proceed with the registration process. Creating a duplicate organisation on the Supplier Portal will cause confusion both to the Supplying Organisation in question and any customers they work with through the Portal.

Once you have clicked on OK, the following page will be displayed...

Your Registration is being processed

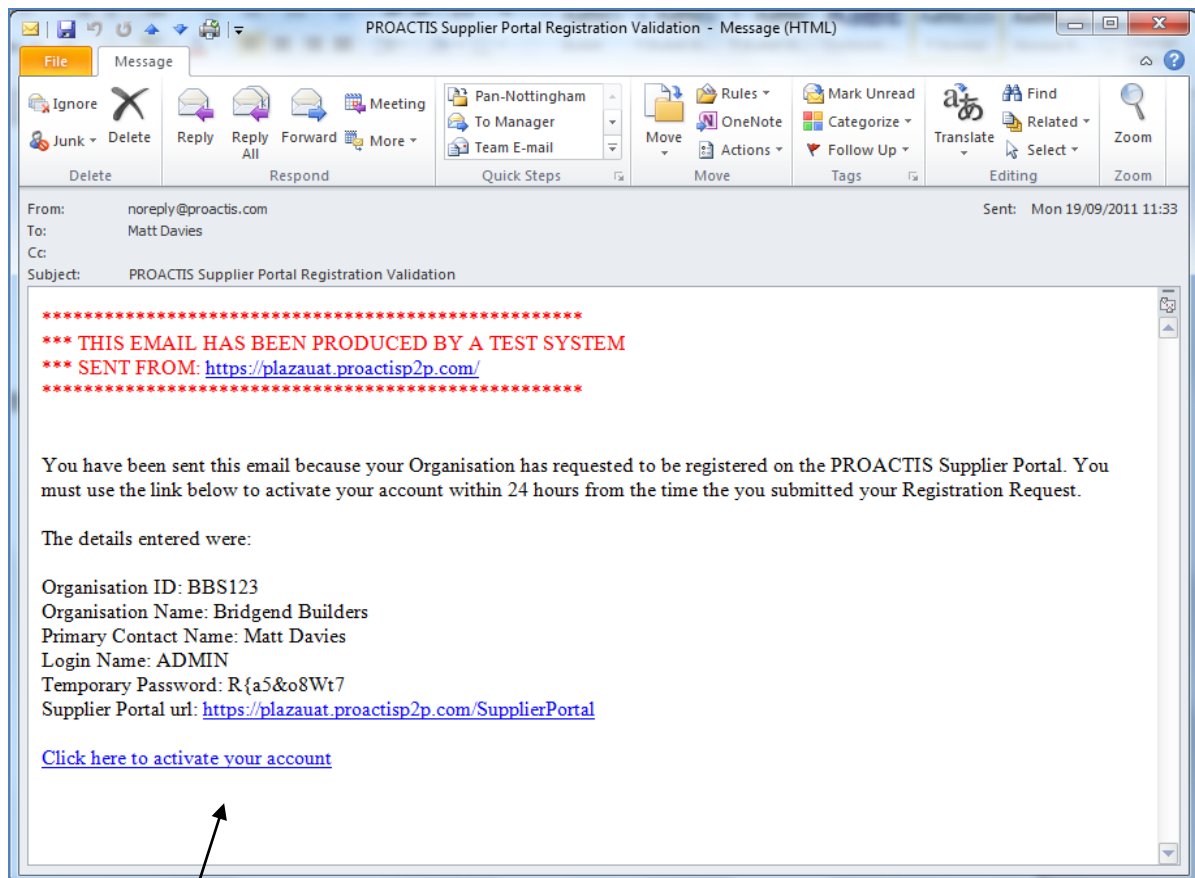
Thank you, your Registration is being processed

1. An activation email has been sent to the email address of your Primary Contact.
2. Click on the link contained within the email to activate your account.

This is STEP 1 completed. Check your email account for the email address used at point of registration to continue to STEP 2.

4.2 STEP 2 – Email Activation

The email referred to is sent immediately, and will look similar to the screen shot below...



Click on the link to activate your account

If you encounter problems with the link insert the Temporary Password noted in the email into the Invited box on the Supplier Portal Home Page and click the Login button

If you did not receive the Activation Email, go to the Supplier Portal Home Page and click on the “Not received email?” link in the bottom left corner of the page in the REGISTER pane. The following page will display...

Registration Problem Resolution

We're sorry that you are experiencing problems with the Registration process. The most likely cause is that you have not received your activation email or that the link in the email doesn't appear to work. These are normally caused by security settings on your computer. Please follow the troubleshooting guidelines below.

If you didn't receive an email then check the following:

1. Check in your Spam or Junk email folder in your email client.
2. Check your Spam or Junk email settings in your email client.

If you received an email, but the link doesn't work then check the following:

1. Copy the link from the mail and paste it in to the address bar of your browser.
2. Check your browser popup settings.

If you have followed the guidelines above and are still having problems, you can get the system to re-send the activation email again by filling in your email address and clicking the **Resend Email** button. Note that non-activated registrations are deleted by the system after 2 days, so you may be asked to complete the registration form again.

Email Address	
Email Address:	<input type="text"/>
<input type="button" value="Resend Email"/>	

Insert the email address used at point of registration and click on the “Resend Email” button

The process of activating your account from the email leads onto STEP 3.

4.3 STEP 3 – Complete Registration

Clicking on the Activation Link in the email will open the following Registration Wizard. Complete the relevant/necessary information and click NEXT to move to the next page. Continue until the registration process is fully complete.

4.3.1 Organisation Details

Enter Organisation Details

This is the first time that anyone from your organisation has used the PROACTIS Supplier Portal. Please enter basic details about your Organisation. Once you are logged into the system, you will be able to amend the details for your organisation at any time by clicking on the Administration menu option.

Click on the Wizard Arrows to move through the various steps. Place your mouse over the help icons (?) for more information about the various fields.

Step 1
Organisation Details

Step 2
Addresses

Step 3
Users

Step 4
What You Sell

Step 5
Buyer Selection

Step 6
User Details

Step 7
Terms and Conditions

Step 8
Finish

Next >

Organisation ID:

Organisation Name:

Company Registration Number:
 ☒ Not Applicable

VAT Registration Number:
 ☒ Not Applicable

DUNS Number: (?)
 ☒ Not Applicable

Organisation Type: (?)

☐ Public Company
☐ Limited Liability Company
☐ Partnership
☐ Sole Trader
☐ Limited Liability Partnership
☐ Government Body
☐ Third Sector

Next >

NOTE: you MUST tick a relevant Organisation Type

Click Next

4.3.2 Addresses

Enter Address Details

Please enter any additional Addresses for your Organisation. This step can be skipped, you can add more addresses later.

Step 1
Organisation Details

Step 2
Addresses

Step 3
Users

Step 4
What You Sell

Step 5
Buyer Selection

Step 6
User Details

Step 7
Terms and Conditions

Step 8
Finish

< Back

Next >

Addresses:

Address	Enabled	Action
Innovation Centre, Technology Drive, Bridgend, Bridgend, CF31 1PP, UNITED KINGDOM	<input checked="" type="checkbox"/>	

Add Address

< Back

Next >

Click on the blue pencil icon to the right of an address to amend it, and click "Add Address" to add any additional addresses that may be linked to users for the supplying organisation in the Portal.

Click Next

4.3.3 Users

Enter User Details

Please enter any additional users who require access to the Supplier Portal. This step can be skipped, you can add more users later.

You also specify here whether the user can be contacted by a Buyer for particular types of transactions.

Step 1
Organisation
Details

Step 2
Addresses

Step 3
Users

Step 4
What You Sell

Step 5
User Details

Step 6
User Details

Step 7
Terms and
Conditions

Step 8
Finish

< Back

Next >

Users:

Login Name	Full Name	Email Address	General Contact	e- Procurement Contact	Sales Contact	Payment Contact	Action
ADMIN	Matt Davies	matt.davies@proactis.com	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	

Add User

< Back

Next >

Click on the blue pencil to amend details about your users and click “Add User” to add any other users. **NOTE:** there can only be a maximum of 5 users per supplier organisation. Each user created will receive an activation email to confirm/amend any details before being able to login and use the system.

Adding a new user opens the following dialogue box...

New User Details

User Details

Contact Type

Login Name: (Mandatory)

First Name: (Mandatory)

Surname: (Mandatory)

Email Address: (Mandatory)

Telephone Number: (Mandatory)

Mobile Number:

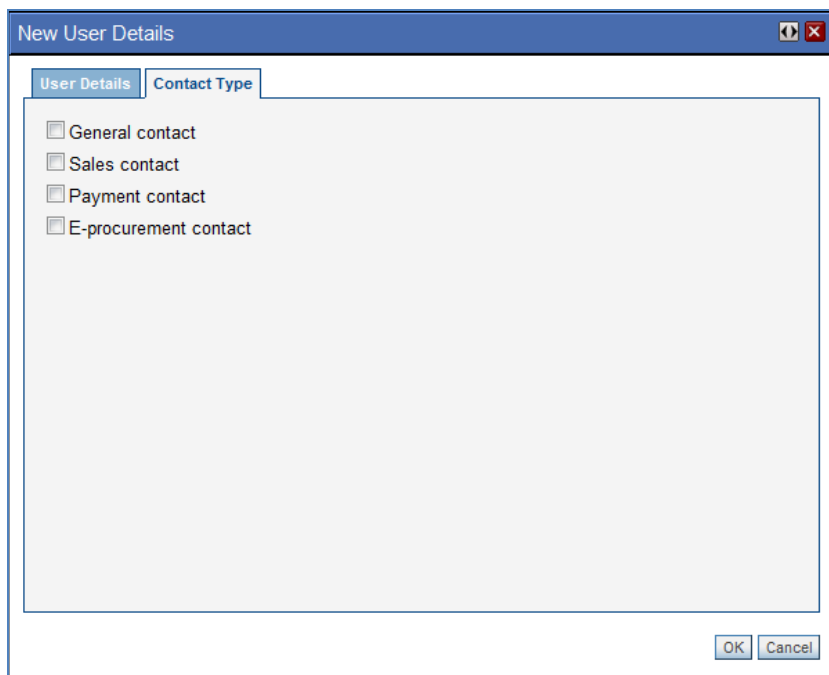
Fax Number:

Address:
Innovation Centre, Technology Drive, Bridgend, Brid

OK

Cancel

The Contact Type can also be set accessing the top “Contact Type” Tab. Users can be allocated to different types of contact – General / e-Procurement / Sales / Payment. Each supplying organisation **MUST** have one of each at least. As a general note – Sales contacts will receive emails about new opportunities from potential customers and General Contacts may receive admin-related emails (e.g. updating documents etc.)



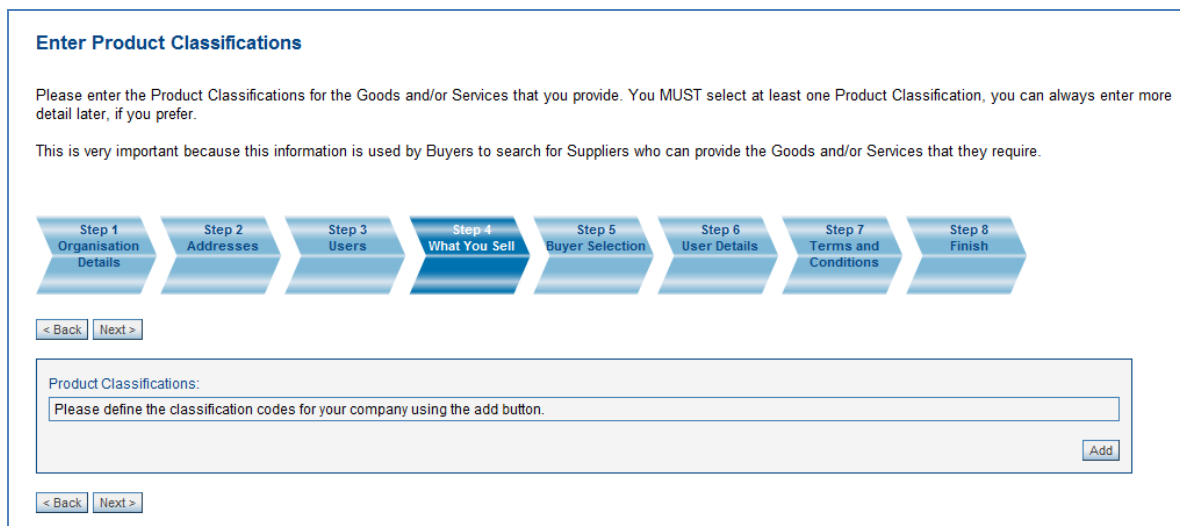
The 'New User Details' dialog box has a title bar with a maximize and close button. It contains two tabs: 'User Details' and 'Contact Type'. The 'Contact Type' tab is active, showing four unchecked checkboxes: 'General contact', 'Sales contact', 'Payment contact', and 'E-procurement contact'. At the bottom right are 'OK' and 'Cancel' buttons.

Click OK to save the changes

Once all users have been created/set-up appropriately, click NEXT

You may be prompted that there is missing mandatory information for your initial user. In which case click on the blue pencil for the relevant user and insert the relevant information (this is normally the phone number of the individual)

4.3.4 What You Sell



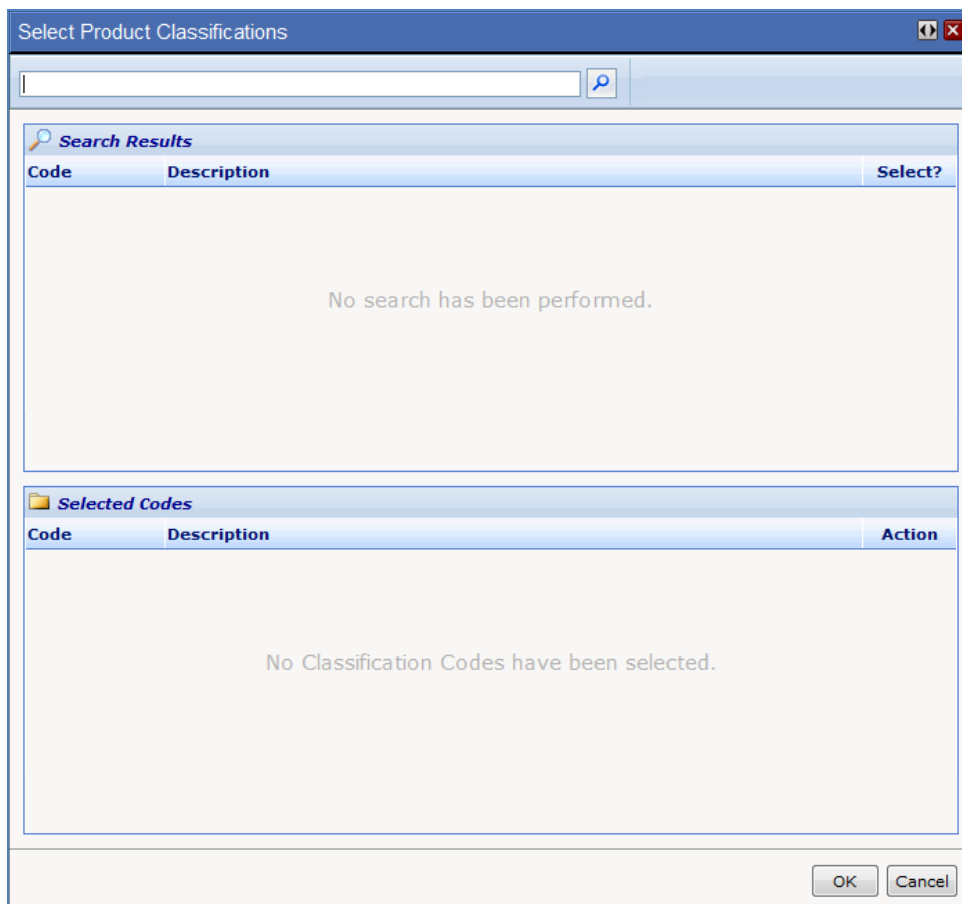
The 'Enter Product Classifications' screen has a title bar. Below the title, it says: 'Please enter the Product Classifications for the Goods and/or Services that you provide. You MUST select at least one Product Classification, you can always enter more detail later, if you prefer.' Below this, it says: 'This is very important because this information is used by Buyers to search for Suppliers who can provide the Goods and/or Services that they require.'

A progress bar shows eight steps: Step 1 Organisation Details, Step 2 Addresses, Step 3 Users, Step 4 What You Sell (highlighted), Step 5 Buyer Selection, Step 6 User Details, Step 7 Terms and Conditions, and Step 8 Finish.

Below the progress bar are '< Back' and 'Next >' buttons. Below these is a text area with the label 'Product Classifications:' and the instruction 'Please define the classification codes for your company using the add button.' At the bottom right of the text area is an 'Add' button. At the bottom of the screen are '< Back' and 'Next >' buttons.

Here the organisation needs to be defined in line with the goods/services it can provide the Portal Customers.

Click Add



Insert a keyword and click on the Magnifying Glass to search for relevant classifications

The results will display in the top pane and can be ticked to be included. In which case, the Classification will be added to the “Selected Codes” pane (the bottom pane). There may be several pages of results and as such multiple classifications can be ticked from the search results and added to the “Selected Codes area” by ticking them. If necessary the keyword can be changed and the search re-run and additional classification can be ticked to add until eventually all relevant classifications that define your organisation have been added. The screen shot below shows the scenario where one classification has been ticked in a multiple page search result...

NOTE: To avoid you receiving unnecessary emails and messages please ensure that the Product Classifications (CPV Codes) selected are relevant to your organisations’ business activities.

Select Product Classifications

computer

Search Results

Code	Description	Select?
22471000	Computer manuals.	<input checked="" type="checkbox"/>
30100000	Office machinery equipment and supplies except computers printers and furniture.	<input type="checkbox"/>
30199330	Continuous paper for computer printers.	<input type="checkbox"/>
30200000	Computer equipment and supplies.	<input type="checkbox"/>
30211000	Mainframe computer.	<input type="checkbox"/>
30211100	Super computer.	<input type="checkbox"/>
30211300	Computer platforms.	<input type="checkbox"/>
30211400	Computer configurations.	<input type="checkbox"/>

Result Page: << 1 2 3 4 5 6 7 8 9 10 >>

Selected Codes

Code	Description	Action
22471000	Computer manuals.	<input checked="" type="checkbox"/>

Result Page: 1

OK

Cancel

Click on OK to add the relevant classifications to the Portal Profile. If required, click on Add again and repeat the process to add more. You **MUST** define at least one classification to progress with the registration process.

Click Next

4.3.5 Buyer Selection

Select Buyer Organisations

Please select the Buyer Organisations that you would like to do business with.

The Buyer selection process is optional and can be performed after you have registered.



< Back Next >

Buyer Organisations:					
Title	Town	Post Code	County	Country	Selected?
ANDY COMPANY	Bridgend			UNITED KINGDOM	<input type="checkbox"/>
AsiaPac Demonstration Organisation	Brisbane	4000	QLD	AUSTRALIA	<input type="checkbox"/>
Big Buyer PLC	Wetherby	WB12 8ZZ		UNITED KINGDOM	<input type="checkbox"/>
Denbighshire County Council	Ruthin	LL15 1YN	Denbighshire	UNITED KINGDOM	<input type="checkbox"/>
East of England Ambulance Service NHS Trust	Bury St Edmunds	IP33 1HP	Suffolk	UNITED KINGDOM	<input type="checkbox"/>
Genesis Housing Group	a			UNITED KINGDOM	<input type="checkbox"/>
Herefordshire Council	Hereford	HR1 1SH	Herefordshire	UNITED KINGDOM	<input type="checkbox"/>
Jeff Parker Organisation	Bridgend	CF31 3NA	Mid Glamorgan	UNITED KINGDOM	<input type="checkbox"/>
John Griffiths Enterprises	Bridgend	CF31 3NA	Mid Glamorgan	UNITED KINGDOM	<input type="checkbox"/>
Matt Buyer Organisation	Matt	CF31 3NA		UNITED KINGDOM	<input type="checkbox"/>
Matt Collaborative Group	Matt Town			UNITED KINGDOM	<input type="checkbox"/>
Pan Nottingham Group (Ashfield, Basstelow, Browxtowe, Gedling, Rushcliffe, Nottingham City, Mansfield, Nweek & Sherwood)	N/A	NA		UNITED KINGDOM	<input type="checkbox"/>
Peabody Trust	London	SE1 7JB		UNITED KINGDOM	<input type="checkbox"/>
Richie Northcote Enterprises	Bridgend	CF31 3NA		UNITED KINGDOM	<input type="checkbox"/>
System Advisors Group	Casablanca			MOROCCO	<input type="checkbox"/>
University of Hull	Hull	HU6 7RX		UNITED KINGDOM	<input type="checkbox"/>

< Back Next >

The above screen shot is taken from a test system and does not represent the list of potential Customers that are available in the live Supplier Portal.

Tick the boxes of the Buyer Organisations/Customers that you wish to be able to participate with.

NOTE: depending on the customer they may send you a request via email for a "Trading Relationship" which will ask for a Questionnaire to be completed and possibly documents to be uploaded as part of an approval process. In which case for any advice please contact that particular customer as the process will be specific to them.

Once complete, click Next

4.3.6 User Details

Complete Admin Details

Please complete the details for the administration user.

Step 1
Organisation
Details

Step 2
Addresses

Step 3
Users

Step 4
What You Sell

Step 5
Buyer Selection

Step 6
User Details

Step 7
Terms and
Conditions

Step 8
Finish

Personal Details

Organisation Name:

Login Name:

First Name:

Surname:

Email:

Telephone:

Check and amend any user details as required. Note that the Organisation name and Login Name have now been set after STEP 1 above in this section and as such cannot be changed

Once complete, click Next

4.3.7 Terms and Conditions

Terms and Conditions

Please read the terms and conditions for using the PROACTIS Supplier Portal. You must agree to these terms and conditions before proceeding. You can review these at any time by clicking on the legal link at the foot of every page in the Supplier Portal.

Step 1
Organisation
Details

Step 2
Addresses

Step 3
Users

Step 4
What You Sell

Step 5
Buyer Selection

Step 6
User Details

Step 7
Terms and
Conditions

Step 8
Finish

PROACTIS GROUP LIMITED
 USER LICENCE
 YOU MUST READ THE FOLLOWING BEFORE CONTINUING

The use of the software provided by PROACTIS Group Limited is subject to the following User Licence. You must carefully read through the User Licence. By accepting the License you confirm that you have read the User Licence and that you agree to be bound by the terms and conditions of the User Licence at all times. If you are accepting the User Licence on behalf of a firm or corporate entity you warrant that you have the authority to do so.

If you do not agree to be bound by the User Licence you will not be able to activate and use the

☐ I have read and understood the Terms and Conditions for using the Supplier Portal

Read the terms and conditions of the use of this Supplier Portal and tick the box to denote you have read and understood the terms and that you agree to abide by them. If you do not agree you cannot complete the registration process.

Once you have ticked the box, click Next

4.3.8 Finish

Complete Registration

Thank you for completing the registration process. Please enter a new password to continue.

We recommend that you make a note of the following details. You will need this information the next time you log into the Supplier Portal

Step 1
Organisation
Details

Step 2
Addresses

Step 3
Users

Step 4
What You Sell

Step 5
Buyer Selection

Step 6
User Details

Step 7
Terms and
Conditions

Step 8
Finish

< Back

Next >

Organisation Name:

Bridgend Builders

Organisation ID:

BBS123

Login Name:

ADMIN

Enter Password:


Repeat Password:

< Back

Next >

Finally insert a password for the admin user and repeat it. The password MUST be 4 and 15 characters of which 2 must be numbers. Passwords expire every 2 months in the Supplier Portal

Once complete, click Next


PROACTIS
 SUPPLIER PORTAL

19 September 2011 Matt Davies, Bridgend Builders

LOGOUT

Home Opportunities Customers Administration Help

Supplier Home

Home

Opportunities

Customers

Administration

Help

Welcome Matt Davies

From here you can do the following:

- [Opportunities](#) - view opportunities.
- [Customers](#) - manage your Customers and Trading Relationships.
- [Administration](#) - specify Portal preferences and maintain details of your Organisation.

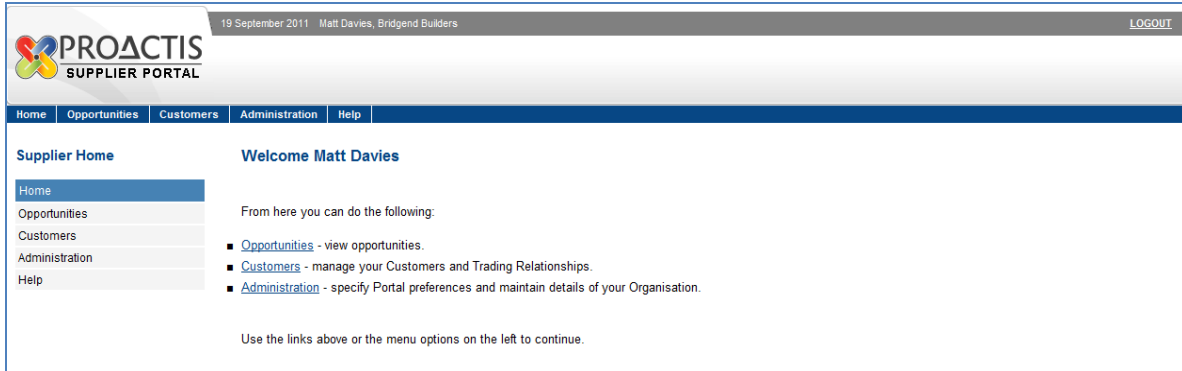
Use the links above or the menu options on the left to continue.

The registration process is now complete and the user can now view and register against any opportunities, manage their customers and Administer the Organisation Information.

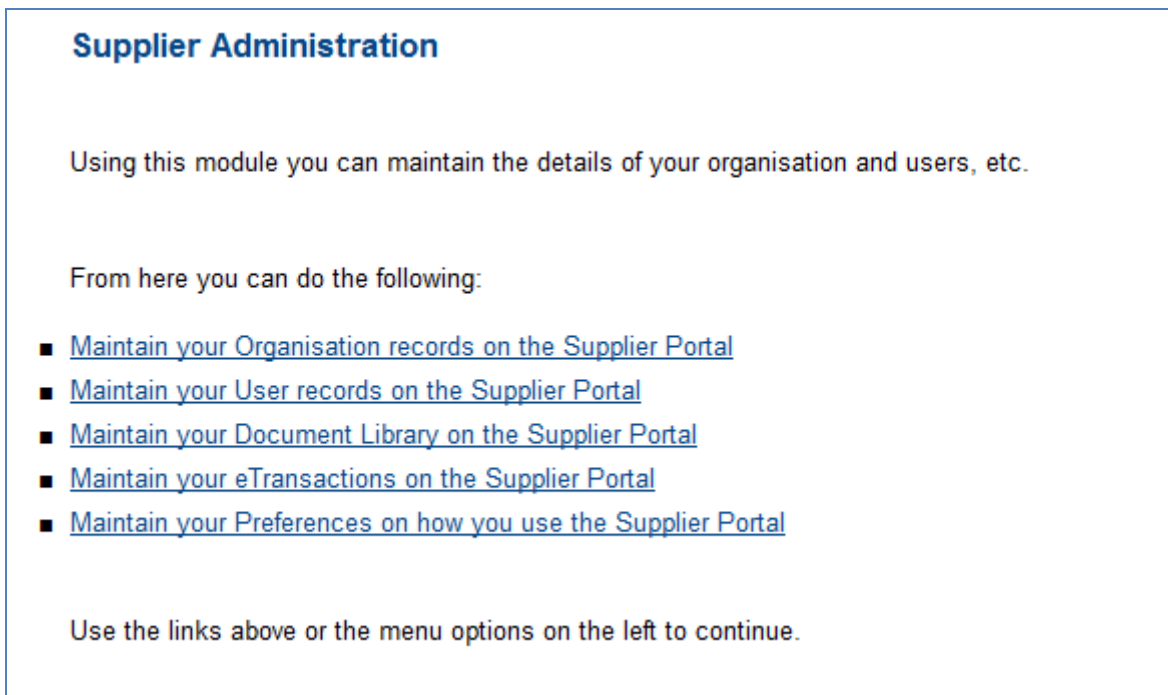
IMPORTANT: only the initial user created for the Supplying Organisation will have “Administration” access as the Primary User for the organisation.

5 Amending the Organisation Profile

Only the initial user created as part of the registration process can administer the Organisation details. Login to the Supplier Portal as that user. Please also see the information in Section 4.1 on page 9 of this document.



Click on the “Administration” Link



5.1 Amending Organisation Details

Click on the “Maintain your Organisation records on the Supplier Portal” link

Amend Organisation Details

This screen allows you to amend the details for your organisation.

General

Shop Window

Addresses

Business Info

What You Sell

Customer Information

Organisation ID:


Organisation Name:

Company Number:


☒ Not Applicable

VAT Registration Number:

☒ Not Applicable

DUNS Number: 

☒ Not Applicable

Categories for your Organisation: 

☐ Public Company
☒ Limited Liability Company
☐ Partnership
☐ Sole Trader
☐ Limited Liability Partnership
☐ Government Body
☐ Third Sector

Note there are different tabs for different information – General, Addresses, What You Sell. For each, make any relevant changes and click on the SAVE button.

Remember: a blue pencil will open a new window for information to be changed. A red cross will remove an entry (e.g. a Classification)

The Business Info information should NOT be changed

The Customer Information Tab will hold a list of customers that have been registered with and further customer-specific information may be required to be maintained. Flintshire County Council do not require such information. Please note that this may change in the future.

Clicking on Save will take the user back to the Supplier Administration Page shown above

5.2 Amending Users



From the Supplier Administration page shown above click on the “Maintain your User records on the Supplier Portal” link

List of Users

From here you can view and amend the Users for your Organisation.

View:



ID	Name	Email	Action
ADMIN	Matt Davies	matt.davies@proactis.com	 

Click the blue pencil to amend a user's details or click on the red cross to remove a user from the system

Make any relevant change to the user's details and click on Save

5.3 Document Library

The Supplier Portal contains an area for suppliers to upload and maintain documents they wish to share with buying organisations. This may be insurance documents, health and safety certificates, latest audited accounts etc.

From the Supplier Administration Page shown above, click on the “Maintain your Document Library on the Supplier Portal” link

List of Documents

From here you can view and amend the Documents held in your Document Library.

By maintaining your documents centrally, it will be easier when you are responding to Buyers on Opportunities or Trading Relationships.

[New Document](#)

View:
[All Documents](#) [Go](#) [Advanced Search](#)

No records found

Click “New Document”

Add Document


Upload Document

Locate and upload the appropriate document.

Filename: [Browse...](#)

Document Type: [Employers Liability Insurance Certificate](#)

Description:

Expiry Date: 

☐ Visible To Buyer?

[OK](#) [Cancel](#)

Browse to find the electronic file to be uploaded. Select the relevant Document Type from the drop-down list. Insert a Description for the document. Insert an Expiry Date for the document (if relevant) and tick the box for “Visible to Buyer” so that all customers you are affiliated with can view the document from your profile.

Click OK to save the changes.

To amend an existing document...


List of Documents

From here you can view and amend the Documents held in your Document Library.

By maintaining your documents centrally, it will be easier when you are responding to Buyers on Opportunities or Trading Relationships.

[New Document](#)

View:
[All Documents](#) [Go](#) [Advanced Search](#)

Document Type	Title	Upload Date	Expiry Date	Visible To Buyer	Action
Health and Safety Policy	Health and Safety Policy for Bridgend Builders	19/09/2011 13:17	29/09/2011	Yes	

Click on the Magnifying Glass for the relevant document

Document Details

From here you can view and amend the Document.

[< Back](#) [View Document](#) [Update Document](#)

Document:

Document Type:

Description:

Last Upload Date:

Expiry Date:

Visible To Buyer:

[< Back](#) [View Document](#) [Update Document](#)


Click on the "Update Document" button

Update Document

Filename: [Browse...](#)

Document Type:

Description:

Expiry Date: 

☒ Visible To Buyer?

[OK](#) [Cancel](#)

Make the changes as required uploading the replacement document and click OK.

NOTE: maintaining a Document Library can assist in making responding to opportunities a more efficient process. For example, if a customer as part of a response to an Invitation To Tender requests Public Liability Insurance to be provided as part of a questionnaire and it has already been uploaded AND the expiry date has not passed the document will automatically be uploaded for you by the system from the Document Library.

6 Registering Interest in a New Opportunity

6.1 Introduction to Concepts

When Buying Organisations, using the Portal, wish to purchase goods/services there may be 2 ways in which suppliers can respond. Some purchases will be defined as a Request and issued directly to the suppliers – for example, a request for quotation. In this case the Sales Contact(s) for the Supplying Organisation sourced for the procedure will receive an email asking for a response to the request (see later in this guide on how to respond to a request). The alternative is that the purchase is advertised as an opportunity that suppliers can register interest against and then in turn respond to the request. As such, the Opportunity will be displayed in the Opportunities area of the Supplier Portal.

The classifications that are defined for your organisation, as part of the registration process, will be used by customers/buying organisations to send emails to suppliers matching the relevant classification when they are advertising the opportunity (also referred to as publishing the notice). To this extent, classifications are highly important to define correctly and as thoroughly as possible to gain opportunities for new business.

It is advised that suppliers do not take this for granted and periodically check the Opportunities area for any new business that they can register interest against and therefore participate in the competition with other suppliers.

It is important to note that being a registered supplier on the Supplier Portal does not guarantee new business will be won, but just that the supplier has the ability to provide a response which will be evaluated by the potential customer. This evaluation will dictate which supplying organisation wins the contract.

6.2 How to Register Interest in a New Opportunity

As noted above, an email may have been received informing you of the opportunity, or the opportunity may have been found by perusing the list available. Either way, follow the steps below to register interest...

1. Login to the Supplier Portal
2. Access the "Opportunities area"

Opportunities

This module allows you to find and respond to Opportunities which have been published by the Buyer Community on the PROACTIS Supplier Portal.

From here you can do the following:

- [Search for new Opportunities](#) and Register Interest.
- [Review Registrations Of Interest](#) that you have submitted to Buyers.
- [Review Requests](#) for Information, Quotation or Tender which have been sent to you by Buyers.
- [Review your Responses](#) to the Buyer.
- [Bid in e-Auctions](#)

Use the links above or the menu options on the left to continue.

3. Click "Search for new Opportunities" link

List of Opportunities


From here you can search for all Opportunities that have been entered on the PROACTIS Supplier Portal.

You can Register Interest in any Opportunity.

View:

Recent Opportunities

Opportunities:

ID	Buyer	Description	Closing Date	Registered Interest?	Action
SRCREQ 1000039	Pan Nottingham Collaboration Group	Test	28/09/2011	<input checked="" type="checkbox"/>	

4. Search, if required, for any opportunities
5. From the list click on the ID column or the Magnifying Glass icon for the relevant opportunity

Opportunity Details

Click the button below to register your interest in this opportunity.

< Back
 Register Interest

Pan Nottingham Collaboration Group: SRCREQ_100039

Description:
 Test

Closing Date:
 28/09/2011

Contract Start Date:

Contract End Date:

Address:
 N/A
 N/A
 NG1 1AA
 UNITED KINGDOM

Purchasing Contact:
 Admin User
 01656 665088
 dummy@proactis.com

< Back
 Register Interest

The example screen shot above is taken from a test system. In a live environment the Description will be completed in more detail by the buying organisation/customer. The Contract Start and End dates will be completed also. The Expiry Date is the deadline for registering interest in the opportunity. The Purchasing Contact will be the person running the purchasing activity from the Buying Organisation and should be your first point of call for any queries.

- Click the “Register Interest” button. The following page will be displayed...

Acknowledge Interest in Opportunity

The Buyer has been informed of your Interest in this Opportunity.

You should receive a Request from the Buyer giving more details of the Opportunity and telling you what further information they will require.

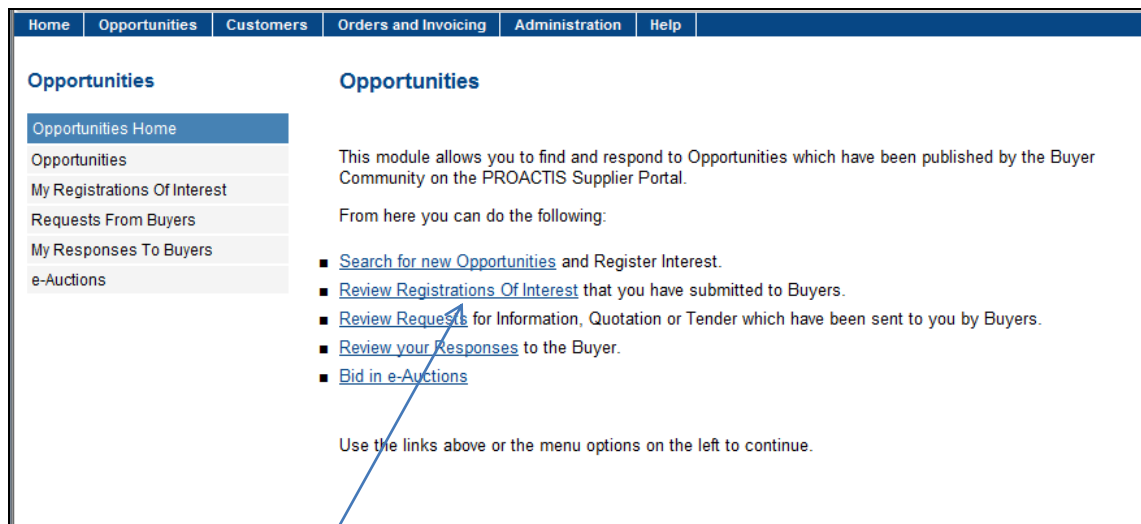
- The Supplier User that has registered interest should then proceed to respond to the opportunity (answering questions, providing prices, etc.). See the next section in this User Guide
- NOTE:** if a Supplier wishes to withdraw from an opportunity, go to the Opportunities area of the Supplier Portal and click on the “Review Registrations of Interest” link (shown in step 2 above). From the list of registrations of interest, click on the ID or Magnifying Glass for the registration and then click on the “Withdraw” button

7 Responding to a Request

This is the completing of the Request Information. For example, providing prices for a request for quotation, responding to a Pre-Qualification Questionnaire, or responding to an Invitation to Tender.

7.1 Creating a Response

1. Login to the Supplier Portal
2. Access the Opportunities area



3. Click on the "Review Requests" link
4. The following page will appear...

Requests from Buyers

This screen allows you to review the Requests that have been sent to you by Buyers. You can review their Request and then create a Response.

View:
 Outstanding Requests

Requests from Buyers:

ID	Buyer	Description	Closing Date	Status	Action
eREQ_1000006	Matt Organisation for Release 4.6	eAuction 6	07/01/2011	Closed	
REQ1000032	Matt Buyer Organisation	2 stage test	21/06/2010	Closed	
eREQ_1000056	Matt Organisation for Release 4.6	MD - test 2 stages in 1	03/06/2011	Closed	
eREQ_1000057	Matt Organisation for Release 4.6	MD - test 2 stages in 1	03/06/2011	Issued	
eREQ_1000016	Matt Organisation for Release 4.6	deadlione 3	10/03/2011	Issued	
eREQ_1000003	Matt Organisation for Release 4.6	Test eAuction 3	07/01/2011	Closed	
REQ1000040	Matt Buyer Organisation	Grant Test 1	08/07/2010	Closed	
REQ1000028	Matt Buyer Organisation	test	14/05/2010	Closed	
REQ1000084	Matt Buyer Organisation	eAuction test	05/11/2010	Closed	
REQ1000061	Matt Buyer Organisation	test for closing date	24/08/2010	Closed	

The View can be filtered using “Outstanding Requests”, “Processed Requests”, or “All Requests”. The default is “Outstanding Requests”.

- When you have identified the “Opportunity” that you are interested in click on the ID or the Magnifying Glass to view the Request from the Buyer in more detail and to respond
- First the Notice is displayed...

Details of a Request from a Buyer

This screen shows the details of the Request from the Buyer.

Overview **Items** Documents

Matt Organisation for Release 4.6: eREQ_1000080

Description:
Provision of IT Training Manuals for MS Office

Title:
 Provision of IT Training Manuals

Closing Date:
 04/07/2011 00:00

Contract Start Date:
 27/06/2011

Purchasing Contact:
 Matt Davies
 01111 111111
 matt.davies@proactis.com

Contract End Date:
 26/06/2014

Delivery Date:
 12/07/2011

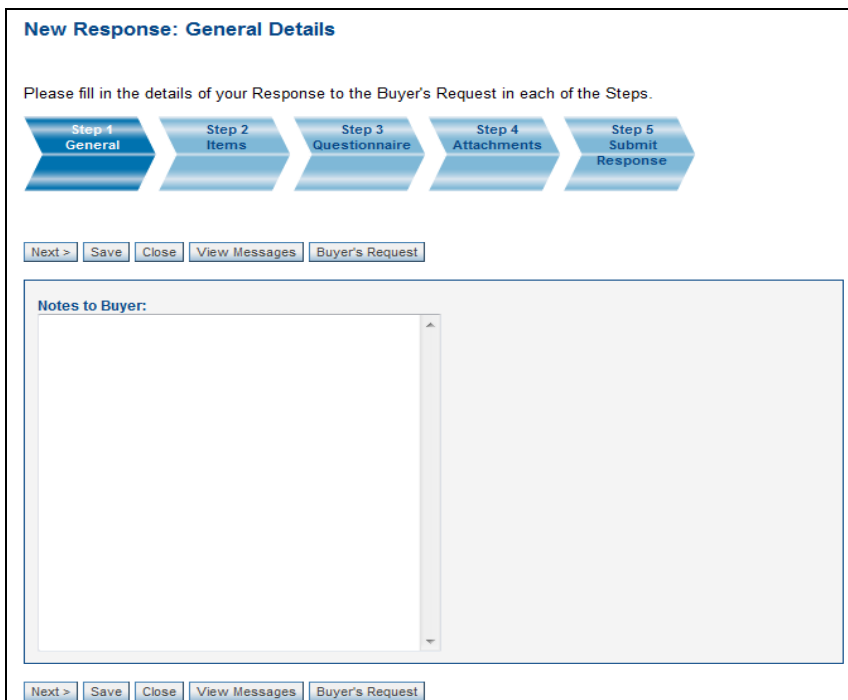
Allow Multiple Responses?
☒

Delivery Address:
 N/A
 N/A
 N/A
 UNITED KINGDOM

IMPORTANT: the deadline (Closing Date) for responses to be submitted is display in the

notice. At this point please access the Documents tab and download all relevant documents to your PC as you will need to refer to these during the process.

7. Click on the “Create a Response” button. A Response Wizard will assist the completion of this process. Note that suppliers can decline the opportunity here also. If you do not wish to be considered for this “Opportunity” please “Decline” at this point as this will stop you getting any further emails or messages relating to the “Opportunity”.
8. First a general note can be inserted for the potential customer...



9. Once complete (it is NOT mandatory) click Next
10. The next page may require pricing to be provided... (This will not require completion for a PQQ).

New Response: Item Details

Please fill in the details of your Response to the Buyer's Request in each of the Steps.

Step 1
General
Step 2
Items
Step 3
Questionnaire
Step 4
Attachments
Step 5
Submit
Response

< Back
Next >
Save
Close
View Messages
Buyer's Request

Items for Lot 1 - Default:							
Ref	Part Number	Description	UOM	Quantity Requested	Quantity Supplying	Unit Price (GBP)	Value (GBP)
#1		MS Word manual	Each	200.00	200.00	0.00	0.00
#2		MS Excel Manual	Each	200.00	200.00	0.00	0.00

< Back
Next >
Save
Close
View Messages
Buyer's Request

Insert the Unit Price for each item. The value will be calculated automatically by the system.

NOTE: there may be several lots listed, in which case a supplier can opt out of providing prices by ticking the box for the relevant lot

Click Next once all relevant pricing has been provided

11. The next page will display a Questionnaire that will require completion. An example is displayed below...

New Response: Answer the Questionnaire

Please fill in the details of your Response to the Buyer's Request in each of the Steps.

Step 1
General
Step 2
Items
Step 3
Questionnaire
Step 4
Attachments
Step 5
Submit
Response

< Back
Next >
Save
Close
View Messages
Buyer's Request

SECTION 1 - ISO 9001 Registration

Please complete the following:

1.1 Are you ISO 9001 registered?

1.2 If yes, what is your registration number?

SECTION 2 - Product Quality

Please complete the following:

2.1 Have you provided us with your quality control procedures? ☒

2.2 How many quality personnel do you have?

SECTION 3 - Stock Holding & Delivery

Please complete the following:

3.01 Do you hold stock of the items requested? ☐

3.02 Can you achieve the required delivery date? ☒

3.03 Please tick the box to confirm that you have answered all questions: ☒

< Back
Next >
Save
Close
View Messages
Buyer's Request

Responses to questions may involve selecting from a drop-down list, inserting data (text/numbers etc.), uploading a document, or ticking a box. A Buyer may determine that some questions are mandatory in which case you will not be able to move onto the next step of the Response Wizard until they have been answered.

Also, it may be that if the same Questionnaire is issued to the same supplier for a different procurement, then answers will be pre-completed based on the last response submitted by the supplier. In which the Questionnaire will just need to be checked and amended where required. **NOTE**; this is not always the case and it depends on how the Buying Organisation has created their Questionnaire, as such **DO NOT RELY ON THIS FUNCTIONALITY**

Click Next

12. The next page will allow for additional/supplementary documents to be uploaded to be considered as part of the response

New Response: Documents

Please fill in the details of your Response to the Buyer's Request in each of the Steps.

Step 1
General

Step 2
Items

Step 3
Questionnaire

Step 4
Attachments

Step 5
Submit Response

[< Back](#)
[Next >](#)
[Save](#)
[Close](#)
[View Messages](#)
[Buyer's Request](#)

Attachments:

No records found

Add Attachment

[< Back](#)
[Next >](#)
[Save](#)
[Close](#)
[View Messages](#)
[Buyer's Request](#)

Click on "Add Attachment" and add the document as required.

Click Next

13. The Response is now complete and needs to be submitted...

New Response: Submit to Buyer

Please fill in the details of your Response to the Buyer's Request in each of the Steps.

Step 1
General

Step 2
Items

Step 3
Questionnaire

Step 4
Attachments

Step 5
Submit Response

[< Back](#)
[Submit](#)
[Save](#)
[Close](#)
[View Messages](#)
[Buyer's Request](#)

Matt Organisation for Release 4.6

Description:
Provision of IT Training Manuals for MS Office

Closing Date:
04/07/2011 00:00

Contract Start Date:
27/06/2011

[< Back](#)
[Submit](#)
[Save](#)
[Close](#)
[View Messages](#)
[Buyer's Request](#)

Click on SUBMIT

The following will be displayed...

Response Acknowledged

The Buyer has received your Response to this Opportunity. Please make a note of the Response Number for your records:

Buyer's Request Number: eREQ_1000080
Your Response Number: eRESP_1000089
Date Submitted: 23/06/2011
Submitted By: Matt Davies

7.2 Saving a Response

It is important to note that Suppliers can partially save a response and return to it before finally submitting. Each page of the Response Wizard has a save button. **NOTE:** If the save button is used the response will need to be accessed from a different area of the system to open, complete and submit.

To do so...

1. Login to the Supplier Portal

2. Access the Opportunities area
3. Click on the “My Responses to Buyers” link

My Responses to Buyers

This screen allows you to review all of the Responses that you have prepared to send or have sent to Buyers.

View:
 Responses Not Submitted

My Responses to Buyers:

ID	Buyer	Description	Value	Currency	Submitted Date	Status	Action
RESP1000010	Matt Buyer Organisation	2 stage test Response		GBP		Not Submitted	
eRESP 1000016	Matt Organisation for Release 4.6	deadline 3 Response	0.00	GBP		Not Submitted	
eRESP 1000018	Matt Organisation for Release 4.6	deadline 3 Response	0.00	GBP		Not Submitted	
eRESP 1000017	Matt Organisation for Release 4.6	deadline 3 Response	0.00	GBP		Not Submitted	
RESP1000052	Matt Buyer Organisation	LBN Test Response	0.00	GBP		Not Submitted	
RESP1000048	Matt Buyer Organisation	eAuction test Response	0.00	GBP		Not Submitted	
eRESP 1000020	Matt Organisation for Release 4.6	suppleir submission Response	2,500.00	GBP		Not Submitted	
RESP1000039	Matt Buyer Organisation	test permissions Response	0.00	GBP		Not Submitted	
eRESP 1000007	Matt Organisation for Release 4.6	eAuction test 7 Response	0.00	GBP		Not Submitted	
RESP1000032	Matt Buyer Organisation	Provision of IT Equipment for Facilities Team Response	0.00	GBP		Not Submitted	
eRESP 1000088	Matt Organisation for	Provision of IT Training Manuals Response	40,000.00	GBP		Not Submitted	

4. As a default this page will display Responses Not Submitted. Click on the relevant ID for the Response that needs to be reviewed and submitted. The saved response will be opened and the Response Wizard can be navigated as before and then finally submitted. **NOTE:** the response can be saved and amended as many times as required. Please try and create only one response to an opportunity. **NOTE: If you inadvertently create any additional responses then any information that you have already input into the initial or subsequent responses does NOT carry over to any new response created and you may lose anything already input.**

If the steps above are not followed and the original request is accessed and the user clicks Create a Response, they will be creating an alternative response record. To this end, if the Buyer allows for the supplier to submit multiple responses they could have to repeat the process several times and submit all alternatives.

If a supplier has submitted a Response to the Buyer, and the buyer has determined the supplier can re-submit the response prior to the deadline, the above filter will need to be changed to view “All Responses” which will display those submitted and then the submitted response can be accessed, amended and re-submitted. **NOTE:** do not assume the buyer/customer will allow responses that have been submitted to be amended and re-submitted before the Closing Date – it is a buyer preference that not all buyers will opt in to.

7.3 Dialogues/Messages

Whilst responding to and participating in the competition for a new contract there may be questions a supplier needs to clarify with the potential customer and vice versa. To this extent the Supplier Portal provides a dialogue or message facility.

Each dialogue sent by a buyer will be notified to the supplier via an email explaining to the supplier they should login to the portal and access the messages for the request/opportunity in question. And likewise, where a supplier has initiated or responded to a dialogue/message the contact for the relevant request will receive an email to inform them there is something they should read/respond to.

To access Dialogues/Messages from the Supplier Portal, login to the Supplier Portal and access the Opportunities area, followed by the “Review Requests” link (as if responding to a request). Open the relevant Request record as described earlier...

Details of a Request from a Buyer

This screen shows the details of the Request from the Buyer.

[< Back](#)
[Create a Response](#)
[Decline](#)
[View Messages](#)

[Overview](#)
[Items](#)
[Documents](#)

Matt Organisation for Release 4.6: eREQ_1000080

Description:
Provision of IT Training Manuals for MS Office

Title:
 Provision of IT Training Manuals

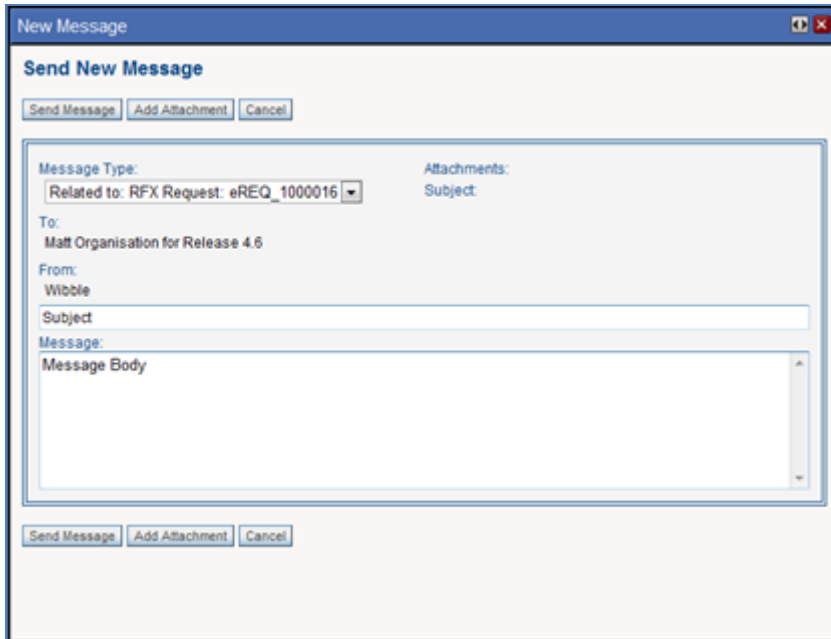
Closing Date: 04/07/2011 00:00	Contract Start Date: 27/06/2011
Purchasing Contact: Matt Davies 01111 111111 matt.davies@proactis.com	Contract End Date: 26/06/2014
Allow Multiple Responses? ✓	Delivery Date: 12/07/2011
	Delivery Address: N/A N/A N/A UNITED KINGDOM

[< Back](#)
[Create a Response](#)
[Decline](#)
[View Messages](#)

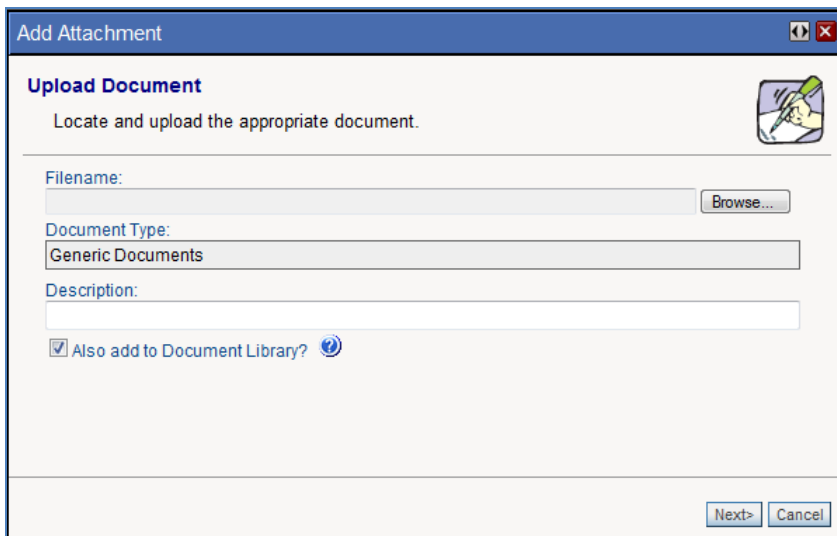
Click on the “View Messages” button



Click “New Message”



Insert a relevant Subject and Message for the Buyer where the terms have been entered in the example above. If a document is required to be attached to the message click on the “Add Attachment” button




Add Attachment

Upload Document
 Locate and upload the appropriate document.

Filename:

Document Type:

Description:

☒ Also add to Document Library? 

Upload the document, providing a description for it and click Next.

Once the message is complete click on the SEND button

The message will appear in the list for the request, as below...

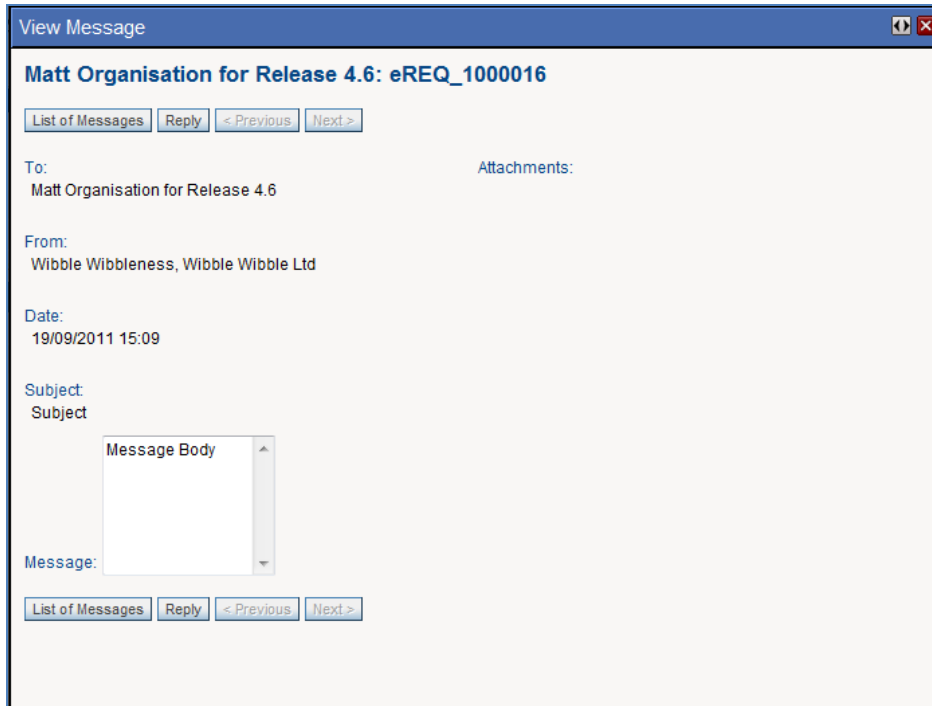


View Messages

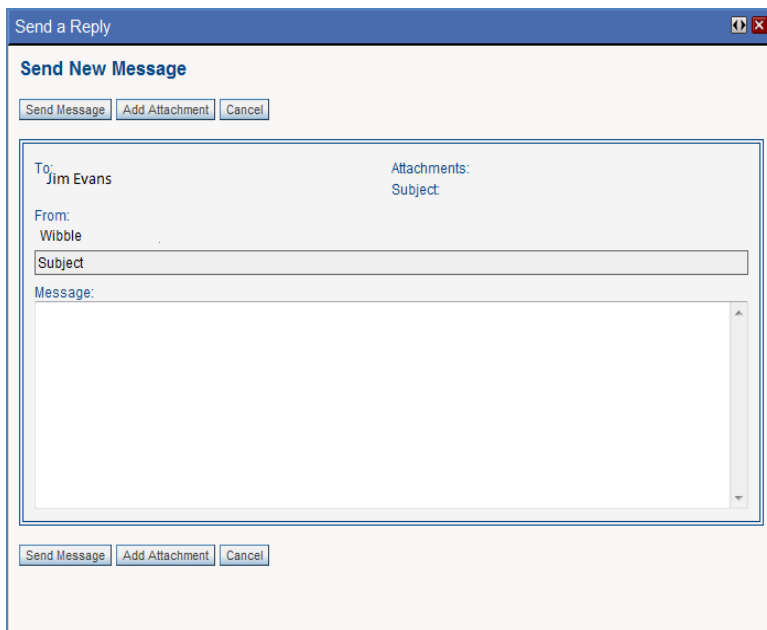
Matt Organisation for Release 4.6: eREQ_1000016

PostedDate	Originator	Subject	Replied?	Action
19/09/2011 15:09	Wibble Wibbleness	Subject		

To view and respond to any existing message open it by clicking on the Date/Time or the Magnifying Glass button



Here the messages can be navigated through using the Previous and Next buttons, the user can go back to the “List of Messages” or a reply can be created. Clicking on reply will open the following page...



Type in the reply in the Message box, and attach any documents (if required), then click “SEND MESSAGE”

8 Participating in an e-Auction in the Supplier Portal

Any e-Auction will require Suppliers to provide an initial response with pricing and there may be a Questionnaire to complete if the contract is being awarded on a most economically advantageous basis. Please note that not every “Opportunity” will have an e-Auction stage.

In this instance, follow the steps in the previous section on “Responding to a Request”. The Buying Organisation will further inform you when the e-Auction itself is to be run. Once the e-Auction has been opened access it as follows...

1. Access the Opportunities in the Supplier Portal

Opportunities

This module allows you to find and respond to Opportunities which have been published by the Buyer Community on the PROACTIS Supplier Portal.

From here you can do the following:

- [Search for new Opportunities](#) and Register Interest.
- [Review Registrations Of Interest](#) that you have submitted to Buyers.
- [Review Requests](#) for Information, Quotation or Tender which have been sent to you by Buyers.
- [Review your Responses](#) to the Buyer.
- [Bid in e-Auctions](#)

Use the links above or the menu options on the left to continue.

2. Click on the “Bid in e-Auctions” link. A list of existing e-Auctions will be displayed...


List of e-Auctions

From here you can search for and view e-Auctions set up by your customers.

You can place bids on e-Auctions.

View:

Auctions:

ID	Buyer	Description	Start Time	End Time	Status	Action
eREQ1000005	Organisation for User Guide	eAuction for IT Hardware and IT Software	24/06/2011 12:35:00	27/06/2011 00:00:00	In Progress	

3. Clicking on the ID (or magnifying glass) for the relevant Auction in the list will display the following...

e-Auction Details



Click the buttons below to review the Original Request from the Buyer or Bid on this Auction.


Organisation for User Guide: eREQ1000005

Buyer:	Start Time:	Time Left:
Organisation for User Guide	24/06/2011 12:35:00	58:59:28
N/A	End Time:	
N/A	27/06/2011 00:00:00	
N/A	Status:	
UNITED KINGDOM	In Progress	

Special Instructions:
 PLEASE NOTE THAT THE WINNING BID FOR THE AUCTION MAY NOT NECESSARILY WIN THE CONTRACT. WE WILL ALSO BE CONSIDERING THE RESPONSES TO THE QUESTIONNAIRES SUBMITTED BY ALL PARTIES

☐ [Response eRESP1000002: Provision of IT Hardware and IT Software Response](#)

Lot	Description	Lowest Bid	My Latest Bid	Rank	Action
Lot 1	IT Hardware			1	
Lot 2	IT Software			1	

4. From here the supplier user can view any messages/dialogues regarding the e-Auction, can view the relevant information about the e-Auction itself and more importantly can submit bids for each Lot by clicking on the appropriate  button. This in turn will display the following...

New Bid



From here you can Submit a Bid for a Lot in this Auction.

New Bid For: Lot 1 - IT Hardware

Buyer:	End Time:
Organisation for User Guide	27/06/2011 00:00:00
N/A	Time Left:
N/A	58:56:21
N/A	Status:
UNITED KINGDOM	In Progress

Special Instructions:
 PLEASE NOTE THAT THE WINNING BID FOR THE AUCTION MAY NOT NECESSARILY WIN THE CONTRACT. WE WILL ALSO BE CONSIDERING THE RESPONSES TO THE QUESTIONNAIRES SUBMITTED BY ALL PARTIES

Items:

Part Number	Description	UOM	Quantity	My Previous Bid	Lowest Bid	Quantity	Unit Price	Value	Reduce Bid	Free Issue
	HP Laser Printer (Colour)	Each	20.00			20.00				<input type="checkbox"/>
	Compatible Printer Cartridges for Colour Printer	Each	100.00			100.00				<input type="checkbox"/>

Previous Bid: Lowest Bid: This Bid:

NOTE: it can determined when providing the initial bid during the Supplier Response Process whether or not bids will be submitted against a specific Lot or not.

Here insert the Unit Price - the Value is calculated. It can determined that an item is Free Issue (e.g. Delivery may be included as an item for quoting/bidding against and as such due to the quantity being procured the delivery is free). The Reduce Bid Arrows will reduce the Bid Value for the item and NOT the Unit Price. The Value for the item is reduced by 1% each click of the mouse. The "Reduce All" button reduces all values by 1% also.

Once the first bid has been submitted at e-Auction the ranking of the bid can be viewed...

e-Auction Details

Click the buttons below to review the Original Request from the Buyer or Bid on this Auction.

[< Back](#)
[View Messages](#)
[Buyer's Request](#)
[Refresh](#)

Organisation for User Guide: eREQ1000005

Buyer: Organisation for User Guide N/A N/A N/A UNITED KINGDOM	Start Time: 24/06/2011 12:35:00 End Time: 27/06/2011 00:00:00 Status: In Progress	Time Left: 56:54:35
---	---	-------------------------------

Special Instructions:
 PLEASE NOTE THAT THE WINNING BID FOR THE AUCTION MAY NOT NECESSARILY WIN THE CONTRACT. WE WILL ALSO BE CONSIDERING THE RESPONSES TO THE QUESTIONNAIRES SUBMITTED BY ALL PARTIES

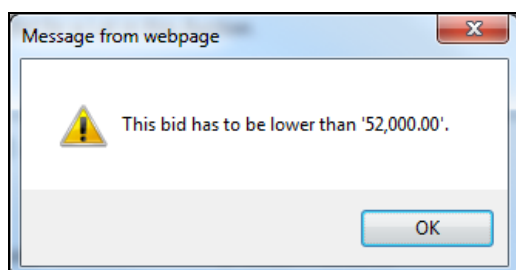
☒ [Response eRESP1000002: Provision of IT Hardware and IT Software Response](#)

Lot	Description	Lowest Bid	My Latest Bid	Rank	Action
Lot 1	IT Hardware	45,000.00	45,000.00	2	
Lot 2	IT Software	52,000.00	52,000.00	1	

[< Back](#)
[View Messages](#)
[Buyer's Request](#)
[Refresh](#)

In the case above the supplier is ranked 2nd for Lot 1 and 1st for Lot 2. Use the Refresh button to manually refresh the page to check if the ranking has changed, and if required submit a new bid.

If a bid value is inserted that is higher than any others an alert will display on-screen stopping the bid being saved...



This process will continue until either all suppliers have completed bidding OR the e-Auction has come to a pre-determined fixed end date/time. Check with your Contact for the e-Auction which is the case.